



California State Board of Education Policy

POLICY #
01-05
DATE
September 2001

SUBJECT

Guidelines for Piloting Textbooks and Instructional Materials

REFERENCES

California Constitution, Article IX, Section 7.5. *Education Code* Sections 60060-60062, 60200-60206, 60400-60411, 60450-60453.

HISTORICAL NOTES

Adopted, June 1989. Revised, June 1995

Introduction

The State Board of Education has constitutional authority to adopt textbooks for grades one through eight (Article IX, Section 7.5 of the California Constitution), and statutory authority to adopt instructional materials for kindergarten. *Education Code* Sections 60200-60204 describe the process for the adoption of instructional materials for these grades and mandate that submitted materials be evaluated for consistency with adopted content standards and specific evaluation criteria approved by the State Board of Education. (The evaluation criteria are typically incorporated in the curriculum frameworks.) Instructional materials are broadly defined to include textbooks, technology-based materials, other educational materials, and tests. The State Board traditionally adopts only basic instructional materials programs, i.e., programs that are designed for use by pupils and their teachers as a principal learning resource and meet in organization and content the basic requirements of a full course of study (generally one school year in length).

In order to collect reliable and valid data from a pilot process these guidelines are offered for grades K-8; however, they could be adapted for grades 9-12 which conduct adoptions at the local level by districts or school sites.

Piloting instructional materials using a representative sample of classrooms for a specified period of time during a school year is a frequent part of the adoption process in many school districts. A structured and monitored pilot process can be helpful to school districts and school sites as they consider the adoption of instructional materials.

An effective pilot will help determine if the materials will actually provide teachers with the needed resources to implement a standards-based instructional program. The core of the pilot process is determining the relationship of the materials to the standards and the teachers' evaluations of how well the materials provide students access to the standards. The actual use of the materials in classrooms will provide teachers experience with the program's organization, assessment, and range of instructional strategies. The evaluations of the pilot teachers will carry considerable influence at the decision making time.

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I. Selection of Materials to Pilot

1. Establish a representative committee charged with recommending instructional materials for district adoption. The committee should involve representatives of all populations in the district including, parents, administrators, teachers at all grade levels, and special needs programs, including English learner programs. The committee will:
 - Review criteria for evaluation of instructional resources as outlined in the most recent State Board approved curriculum framework for the subject area under consideration.
 - Review State Board, or District adopted grade level content standards for the specific subject area under consideration, if available.
 - Review the California State Board of Education Adoption Report of Instructional Materials which outlines the K-8 state adoption process and the state level evaluations of each program.
 - Identify student strengths and weaknesses using district or site level data as appropriate. Disaggregate measures of student achievement in mathematics and language arts from API and STAR results. Review results from district assessments in the content area for which materials are being adopted. District assessment data would be especially useful for the content areas that do not have STAR results.
 - Identify student diversity/universal access issues that instructional materials need to address—high achievement, low achievement, English learner populations, special needs populations.
2. Define and prioritize evaluation criteria. Develop an evaluation instrument. The evaluation instrument should reflect criteria from the State, but it should also reflect district or site specific concerns, such as, organization of teacher materials, management/availability of supplemental materials, required level of teacher knowledge, preparation time, etc. The evaluation instrument can also be used as a guide for a preliminary screening of suggested instructional materials for piloting, so that only the few programs most closely aligned with the identified evaluation criteria will be piloted. It is difficult to adequately monitor and support piloting of more than two to four programs.

II. The Pilot

The piloting process should involve representatives of all populations in the district including, parents, administrators, and special needs programs.

Listed below is a suggested chronology of the pilot process.

1. Contact selected publishers to ascertain what assistance they will provide, e.g., number of pilots at free or reduced cost, in-service for the pilot teachers, consultation with teachers during the pilot process.



2. Establish the district contact for the publishers. Set firm ground rules with the publishers and teachers. Limit the amount of materials that can be distributed and to whom.
3. Ensure that teachers are comparing similar components of competing programs by standardizing the components to be piloted e.g., intervention materials, English learner support, skills reinforcement.
4. Consider the use of pre and post testing. This might be done with subject areas that are used to determine API scores or to determine retention/promotion policies.
5. Establish a system for removing non-consumable materials when the pilot is completed. Keep teachers, publishers, and site administrators informed of timelines and procedures.
6. Determine the duration of the pilot. Determine what information is needed from the pilot and give teachers enough time to develop a complete unit or concept so that they will be able to evaluate the program fairly. It is preferable to have teachers use more than one program. This establishes a basis for comparison and evaluation.
7. Set up the pilot sites to represent the various student populations and teacher populations. Have programs distributed equally among grade levels.
8. Require that teachers attend an in-service for their materials. They need to know what they have and how to use it in order to fairly evaluate the materials. They also need to understand that they are part of a small group of people who will be giving valuable input to the selection committee.
9. Review the evaluation instrument with the pilot teachers at the in-service. Distribute it to the publishers prior to the in-service, so they can address criteria during the in-service.
10. Gather evaluations promptly when the pilot process is completed. Compile results and distribute them to the selection committee, teachers, and publishers. Look for trends by grade level, criteria and particular school populations. The committee should use the evaluations as one step in the adoption process.

III. Additional Considerations

1. Keep the offerings of each publisher consistent with the other publishers, so that a bias will not be established toward a publisher who is more “generous”.
2. Caution teachers and publishers about accepting or offering gifts, gratuities, meals, etc. Pilot evaluations need to be based on the merits of the program and its effectiveness with student learning. It is suggested that *Education Code* Sections 60070-60076, be reviewed as these sections specify the prohibitions between publishers and school officials.
3. Establish firm guidelines regarding contact between publishers and district personnel at the outset of the piloting process and monitor during the process. To assist in setting guidelines



it is advisable to review the *Education Code* Sections dealing with Instructional Materials (Grades K-12, Sections 60060-60062, 60450-60453; Grades K-8, Sections 60200-60206; Grades 9-12, Sections 60400-60411).

4. Inform evaluation committees that publishers must comply with numerous statutes and regulations, in particular evaluation committees should be aware that publishers are prohibited from publicizing in their marketing material excerpts, in whole or part, from state advisory IMAP/CRP reports.
5. Verify correlations/standards maps supplied by publishers to actual standards and check the references to specific lessons and page numbers. Materials adopted by the State Board have to be aligned to the standards; however, some may be more suitable for your students' needs than others.
6. Survey educators outside your district to explore their experiences with the instructional materials that are being piloted or considered for adoption.

IV. Roles of Various Entities

These guidelines have been addressed primarily to school districts. It should be noted that districts, publishers, the State Board of Education, the Department of Education, and the Curriculum Commission all may have roles in the pilot process.

The Department's role includes promoting good piloting practices through technical assistance and professional development. Additionally, The Department will become involved if either districts or publishers report allegations of abuse. In such a case the allegations will be investigated and may be reported to the State Board of Education.

Finally, the Curriculum Commission may receive data from pilots as evidence of a program's effectiveness. The Commission, prior to sharing such information, must be assured that objective data was generated through a well-designed and structured pilot process.

For further information and technical assistance please contact the Curriculum Frameworks and Instructional Resources Division at the California Department of Education, Sacramento. Phone: (916) 319-0881. Website: www.cde.ca.gov/cfir.